



USDA TURKEY MARKET NEWS REPORT

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Agricultural Marketing Service

Poultry Programs

Market News Branch

NATIONAL TURKEY MARKET AT-A-GLANCE

DOMESTIC MARKET HIGHLIGHTS

The trade sentiment on frozen whole body hens was steady to instances weak, mostly steady to barely steady, 16-24 lb. toms steady to weak. The undertone on fresh whole turkeys was mostly steady. Fresh whole turkey demand for the holidays was fair to good, frozen slow and in some cases disappointing. Fresh whole turkey offerings ranged from being sold out to light at best. Bulk parts activity ranged from slow to instances fair, bulk meat seasonally slow for current shipments. Some inquiry was noted on 4-8 lb. breast for January, 2004 shipments and on fresh tom breast meat for January – March, 2004.



EXPORT MARKET HIGHLIGHTS

Trading centered on light volumes of tom drums, balance slow. Interest was noted from Africa, Asia and Mexico. Supplies mixed.

WHOLE YOUNG TURKEYS, FROZEN 1/, CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS) **DECEMBER 11, 2003**

	CURRENT SHIPMENTS 2/				FORWARD SHIPMENTS 6/			OPEN COMMITMENTS 7/	
	OFFERS	SALES	WTD AVG	VOLUME (000)	WTD AVG	VOLUME (000)	DEL. PER	VOLUME (000)	DEL. PER
8-16 LB HENS									
EASTERN REGION 3/	67-71.5	67-71.5	68.79	168	-	-	-	-	-
CENTRAL REGION 4/	65-70	67-67.5	67.42	63	-	-	-	-	-
WESTERN REGION 5/	66-70	-	-	-	-	-	-	-	-
16-24 LB TOMS									
EASTERN REGION 3/	60-62	60-62	61.14	70	-	-	-	-	-
CENTRAL REGION 4/	59-61.5	61.5	61.50	27	-	-	-	-	-
WESTERN REGION 5/	60-62	-	-	-	-	-	-	-	-

WHOLE YOUNG TURKEYS, FROZEN 1/, CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS) **DECEMBER 12, 2003**

	CURRENT SHIPMENTS 2/				FORWARD SHIPMENTS 6/			OPEN COMMITMENTS 7/	
	OFFERS	SALES	WTD AVG	VOLUME (000)	WTD AVG	VOLUME (000)	DEL. PER	VOLUME (000)	DEL. PER
8-16 LB HENS									
EASTERN REGION 3/	63-70	65	65.00	20	-	-	-	-	-
CENTRAL REGION 4/	62-69	68	68.00	320	-	-	-	-	-
WESTERN REGION 5/	66-70	-	-	-	-	-	-	-	-
16-24 LB TOMS									
EASTERN REGION 3/	59-61	59	59.00	20	-	-	-	-	-
CENTRAL REGION 4/	59-62	62	62.00	120	-	-	-	-	-
WESTERN REGION 5/	60-62	-	-	-	-	-	-	-	-

1/ May include product stored at temperatures in range of 1 to 25 degrees F. 2/ Includes product priced for shipment within 14 days.

3/ Includes product with 3 percent broth basting. 4/ Includes product with 3-6 percent broth basting. 5/ Includes products with 6 percent broth basting. 6/ Includes product committed for pricing during the previous 24 hours but shipment in more than 14 days from date of commitment. 7/ Includes product committed during previous 24 hours at prices to be determined at later date.

WEIGHTED AVERAGE PRICES FOR WHOLE YOUNG TURKEYS, FROZEN CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS)

	WEEK OF DECEMBER 12, 2003 CURRENT WEEK	LAST WEEK	SAME WEEK YEAR AGO
8-16 LB HENS			
EASTERN REGION	68.94	69.50	67.00
CENTRAL REGION	67.90	67.00	66.59
WESTERN REGION	66.00	69.00**	70.00**
16-24 LB TOMS			
EASTERN REGION	60.84	65.00	61.32
CENTRAL REGION	60.88	61.00	59.27
WESTERN REGION	61.40**	63.90**	61.00

**SOUTHERN CALIFORNIA (L.A. AREA) PROCESSED TURKEY,
DELIVERED TO RETAILERS**

	<u>RANGE</u>
FRESH TURKEYS Y HENS 8-16#	107
FRESH TURKEYS Y TOMS 14-24#	107
FROZEN TURKEYS Y HENS 8-16#	71-74
FROZEN TURKEYS Y TOMS 14-24#	70-73
FROZEN TURKEYS Y TOMS 24-28#	72-80

**SAN FRANCISCO PROCESSED TURKEY
DELIVERED TO RESTAURANTS AND INSTITUTIONS**

	<u>RANGE</u>
TURKEYS Y HENS	109-129
TURKEYS Y TOMS UNDER 22#	99-125
TURKEYS Y TOMS 22-24#	99-125
TURKEYS Y TOMS 24-26#	99-129
TURKEYS Y TOMS 26 LBS & OVER	105-130

FRESH TURKEYS WITH TIMERS OR EQUIVALENT U.S. GRADE A,
DELIVERED FIRST RECEIVERS, EASTERN REGION, CENTS
PER POUND, WEEK OF 15-DEC-2003

	<u>(8-16#)</u>		<u>(16-24#)</u>	
	<u>HENS</u>	<u>LBS</u>	<u>TOMS</u>	<u>LBS</u>
	<u>PRICE</u>	<u>(000)</u>	<u>PRICE</u>	<u>(000)</u>
SALES (PROMOTIONS INCLUDED)	80.33	5270	77.08	5070
SALES (PROMOTIONS NOT INCLUDED)	80.33	5270	77.08	5070
SALES (PROMOTIONS ONLY)				
SALES (PRICE TO BE DETERMINED)		160	160	

TURKEY MOVEMENT TREND (IN THOUSAND POUNDS)
SLAUGHTER-CERTIFIED RTC TURKEYS

NOVEMBER	421,708*
DECEMBER 1-6, 2003	108,333*
To date 2003	5,320,522*
To date 2002	4,938,316*

* PRELIMINARY

NUMBER OF TURKEYS SLTRD IN FEDERALLY INSP PLANTSBY GEOGRAPHICAL AREAS WEEK ENDING 06-Dec-2003
(PRELIMINARY) (RELEASED 1:00 EASTERN TIME)

	<u>—YOUNG TURKEYS—</u>			<u>OLD</u>	<u>TOTAL TURKEYS</u>	
	<u>THOUSAND</u>	<u>PCT CHG</u>	<u>AVG</u>	<u>BANDED</u>	<u>AVG</u>	
	<u>HEAD</u>	<u>PW</u>	<u>LIVE WT</u>	<u>-THOUSAND</u>	<u>HEAD-</u>	<u>LIVE WT</u>
N EAST	860	104	22.69	(A)	861	22.69
SATL	845	89	29.75	(A)	845	29.75
N CENT	2,168	61	32.21	(A)	2,168	32.21
S CENT	514	178	20.17	(A)	514	20.17
WEST	447	65	23.51	(A)	447	23.51
U.S. TOTAL	4,834(B)	81	28.00	1	4,835	28.00
TO-DATE						
2003	230,172(B)			604		230,776
TO-DATE						
2002	229,393(B)			640		230,033

(A) Not published to avoid disclosing individual operations.

(B) Number of young banded breeder turks included: this week 69,000;
for the year 3,090,000; last year to date 2,631,000.**LIVE TURKEYS SLAUGHTERED** W/E 06-Dec-2003

	<u>YOUNG</u>		<u>YOUNG</u>	<u>OLD</u>	<u>TOTAL</u>
	<u>HENS</u>	<u>TOMS</u>	<u>BREEDERS</u>		
	<u>-----THOUSANDS-----</u>				
HEAD	1,924	2,841	69	1	4,835
AVG WT	16.35	35.97	24.85	50.13	28.00
LAST WEEK	1,018	1,605	50	5	2,678
SAME WK YR AGO	2,053	2,863	58	40	5,014
AVG WT	15.77	37.15	24.89	27.71	28.18
TO-DATE/2003	92,597	134,485	3,090	604	230,776
TO-DATE/2002	91,187	135,575	2,631	640	230,033

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NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 11 DECEMBER 2003.

The whitemeat undertone was steady to barely steady at best. Demand light with some processors noticing increased inquiry. Offerings available and held with varied degrees of confidence. Some reluctance is noted to offer out new frozen production at current price levels in anticipation of increased activity the first quarter of 2004. The market was mostly steady on Grade A 4-8 lb. breasts, steady to barely steady on plant grades. Demand was fair to good on fresh 4-8 lb. breasts for the December holidays, light on frozen for December - January shipments. Offerings of frozen Grade A 4-8 lb. breasts were light to adequate, plant grades adequate to fully adequate. Trading centered around a moderately heavy volume of fresh 4-8 lb. breasts and a light volume of fresh tom breast meat, balance slow.

DOMESTIC TRADING	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
BREASTS, 4-8 LBS GRADE A 2/		T	95.00	400
BREASTS, 4-8 LBS GRADE A—FRESH 2/	139.00-160.00		145.17	600
BREASTS, 4-8 LBS PLANT GRADE 2/				
DRUMSTICKS, TOM	43.00		43.00	45
DRUMSTICKS, TOM—FRESH		F	42.00	30
DRUMSTICKS, HEN		T	42.00	20
WINGS, FULL-CUT, TOM	43.00		43.00	80
WINGS, FULL-CUT, HEN				
WINGS, V-TYPE, TOM		T	42.00	40
WINGS, V-TYPE, HEN		R	72.00	20
NECKS, TOM	25.00		25.00	70
NECKS, HEN		F	24.00	40
BREASTS, B/S, TOM 3/	112.00-115.00		113.00	60
BREASTS, B/S, TOM—FRESH 3/	142.00-149.00		143.40	250
THIGH MEAT	88.00		88.00	5
THIGH MEAT—FRESH	91.00		91.00	10
BREAST TRIM MEAT		T	80.00	10
SCAPULA MEAT		W	71.00	40
TENDERLOINS				
DESTRAPPED TENDERS	75.00-82.00		79.67	120
DESTRAPPED TENDERS—FRESH	111.00		111.00	20
WING MEAT WITH SKIN		F	66.00	68
MECHANICALLY SEPARATED 4/		W	17.00	40
MECHANICALLY SEPARATED—FRESH 4/	16.00-19.00		16.65	102
EXPORT TRADING				
DRUMSTICKS, TOMS	40.00-42.00		40.50	160
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS				
MECHANICALLY SEPARATED 4/	14.00-18.00		16.67	120
THIGH MEAT - FROZEN	88.00		88.00	80

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.):

M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Breasts are bagged; rib, back, and wing meat included; and basted.

3/ Boneless and skinless without tenderloins.

4/ 15-20% fat with skin added.

NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 12 DECEMBER 2003.

The trade sentiment on tom bulk parts was steady to barely steady on full-cut and 2-joint wings, drums mostly steady and necks steady to instances firm. Demand on tom bulk parts was slow to instances moderate. Offerings of tom full-cut wings were mixed ranging from light to instances ample, drums short to sometimes adequate, and necks short of buyers' needs. The undertone hen parts ranged from steady on drums to fully steady on the balance of items. Demand light to fair. Offerings of hen drums light to instances adequate with some noting supplies not as tight as previous weeks, balance light at best. The thigh meat undertone was steady to weak. Demand slow for the adequate to instances burdensome offerings. Trading light on all items. Fresh wing meat traded at 66-74 and fresh scapula at 72-83 cents delivered domestic. Frozen 15-20% mechanically separated turkey traded at 18 cents delivered export for January, 2004 shipments.

DOMESTIC TRADING	PRICE RANGE	LST CDE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY WTD AVG PRICE	WEEKLY VOLUME (000)
BREASTS, 4-8 LBS GRADE A 2/		T	95.00	400	95.00	400
BREASTS, 4-8 LBS GRADE A—FRESH 2/		R	145.17	600	145.17	600
BREASTS, 4-8 LBS PLANT GRADE 2/						
DRUMSTICKS, TOM	42.00-43.00		42.63	160	42.79	285
DRUMSTICKS, TOM—FRESH	44.00		44.00	200	44.00	200
DRUMSTICKS, HEN	43.00		43.00	20	42.50	40
WINGS, FULL-CUT, TOM	41.00-42.00		41.67	120	42.84	310
WINGS, FULL-CUT, HEN						
WINGS, V-TYPE, TOM		T	42.00	40	42.00	40
WINGS, V-TYPE, HEN						
NECKS, TOM	24.00-26.00		25.60	75	25.29	154
NECKS, HEN		F	24.00	40		
BREASTS, B/S, TOM 3/	112.00		112.00	20	112.75	80
BREASTS, B/S, TOM—FRESH 3/	143.00		143.00	200	143.22	450
THIGH MEAT	82.00-88.00		86.00	120	86.08	125
THIGH MEAT—FRESH	89.00		89.00	40	89.57	70
BREAST TRIM MEAT		T	80.00	10	80.00	10
SCAPULA MEAT	72.00		72.00	52	71.57	92
TENDERLOINS						
DESTRAPPED TENDERS	74.00-80.00		77.33	90	78.24	250
WING MEAT WITH SKIN		F	66.00	68		
DESTRAPPED TENDERS—FRESH	111.00-114.00		112.53	60	112.15	80
MECHANICALLY SEPARATED 4/	14.00-16.00		14.67	120	15.25	160
MECHANICALLY SEPARATED—FRESH 4/	17.00		17.00	160	17.14	442
EXPORT TRADING						
DRUMSTICKS, TOMS	42.00-43.00		42.20	200	42.09	704
WINGS FULL-CUT - TOMS						
WINGS, V-TYPE, TOM						
TAILS						
MECHANICALLY SEPARATED 4/		R	16.67	120	17.53	344
THIGH MEAT - FROZEN	79.00		79.00	52	84.24	572

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.):

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2/ Breasts are bagged; rib, back, and wing meat included; and basted.

3/ Boneless and skinless without tenderloins.

4/ 15-20% fat with skin added.